JOB DESCRIPTION

Associate - Probate

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Position	Associate
Department	Probate
Reporting to	Head of Probate
Office	Bishop's Stortford

Overall Purpose

To provide efficient and effective legal advice, assistance and representation for all clients always maintaining the highest standards of professional expertise and client care. To make every effort to obtain a satisfactory result for the client, to be accessible to the clients and to maintain regular and appropriate contact with them. To be expected to deal effectively and considerately with people from diverse cultures and backgrounds.

To work together with other fee-earners, support staff and with other teams to ensure the best quality service.

Main Tasks

Technical

» Manage client matters from start to completion
» Understand and assess a client's commercial and personal circumstances, needs, objectives, priorities, and constraints
» Ensure that advice is informed by appropriate legal and factual analysis and identifies the consequences of different options
» Keep supervisor informed of progress of work, including any risks or problems
» Communicate and update Principal Associates and Partners about the level of work, type of client and the value of the matter
» Maintain up to date technical knowledge
» Draw on a sufficient detailed knowledge and understanding of field(s) of work and role to practice effectively
» Draft letters and documents which are legally effective and accurately reflect the client's instructions
» Progress legal matters using own judgement, recognising when support is needed

- Deal with straight forward transactions, including occasional, unfamiliar tasks which present a range of problems and choices
- Understand the significance of individual actions in the context of the objectives of the transaction/strategy for the case
- Keep up to date with all legal and technological developments and apply them ethically in work
- Conduct and collate legal research in a thorough, pragmatic, and organised manner, using the full range of available tools and technologies and apply it confidently to the matter in hand
- Use the correct legal and other documentation and procedures to deal with the matter, providing supporting evidence of the action taken

File Management

- Manage own files and caseload and take responsibility for management of the matter
- Time record
- Dictate
- Apply understanding, critical thinking and analysis to solve problems and obtain the relevant facts
- Develop and advise on relevant options, strategies and solutions and negotiation solutions to clients' issues
- Initiate, plan, prioritise and manage work activities and projects to ensure that they are completed efficiently, on time and to an appropriate standard, both in relation to own work and work that you lead or supervise
- Keep, use, and maintain accurate, complete, and clear records
- Use experience to check information provided and to form judgements about possible courses of action and ways forward
- To ensure that all client work is progressed expeditiously, and that the client is regularly informed on progress and costs
- Represent information and data honestly, accurately, completely, and confidentially

Client Care

- Maintain a successful working relationship with client care to establish an excellent client care service
- Work with Principal Associates to learn how to deal with complaints professionally and effectively
- Provide a bespoke service but maintain uniformity of delivery
- Recognise and apply the concept of client service to a range of clients and work to improve client centricity within the team
- Show a clear understanding of the clients' existing position, needs and expectations and be able to identify needs that they may not recognise
- Respond appropriately to and manage clients' legal needs and engage others in the team and externally with the necessary legal expertise
- Provide clear legal advice to clients including advice on the available options, the risks, the costs, and the benefits of alternative courses of action, next steps and providing supporting evidence

Financial

- To achieve designated levels of billing, cash and time recording targets
- Assisted by Senior Associates to have responsibility for managing debt and debtors
- Understand the contractual basis on which legal services are provided, including where appropriate how to calculate and manage costs and bill clients
- Apply good business practice
- Contribute to the financial management of the case, including budgets, work in progress, timely billing and collection and variance recognition
- Contribute to engagement management, e.g., resource requirements and case load workflow, to meet the Firm's objectives and budgets

Business Development

- Regular attendance at virtual and face to face trade fairs, exhibitions, networking, and other social events
- Maintain, widen, and leverage network of internal and external contacts and experts
- Understand and communicate the broad range of legal services, considering competitor activity, which may be relevant to clients' needs and raise new opportunities for products and services with clients and senior members of the Firm
- Contribute to converting opportunities into successful new profitable work
- Be an ambassador for the profession and Firm

Compliance

- Act honestly and with integrity, in accordance within legal and regulatory requirements and the SRA Standards and Regulations
- Demonstrate behaviour that reinforces professional standards and regulatory responsibilities and take action in the face of an ethical dilemma
- Demonstrate knowledge of the Firm's risk management procedures
- Be responsible for delivering quality work in compliance with legal procedures and regulatory and organisational standards

Communication

- To demonstrate excellent verbal and written skills for clients
- To work closely with the support team and support staff and to ensure a high level of respect and regard is demonstrated in all communication
- To ensure good working relationships with external institutions and organisations
- Use the most appropriate method and style of communication for the situation and the recipient(s)
- Establish and maintain effective and professional relations with clients and other people
- Provide information in a way that clients can understand, considering their personal circumstances and any

vulnerability

- To always ensure that our services are delivered in a timely manner

Self-Development

- Maintain the level of competence and legal knowledge needed to practice effectively, considering changes in the role and/or practice context and developments in the law
- Work within the limits of competence and the supervision needed
- Not compromise professionalism or integrity in the face of client, external influencer, supplier, or internal pressure
- Identify new developments in working practices and technology and recommend their adoption to deliver solutions to clients
- Where required, apply for, and attain the relevant legal practice, litigation, and advocacy rights, relevant to role
- Work towards the Firm's goals by setting aligned objectives and targets and where appropriate the team
- Establish stretching performance expectations and where appropriate my team, measuring progress against them and taking corrective action on performance deficiencies
- Complete Continuing Professional Development (CPD) requirements and encourage others to engage in CPD activities

Leadership and Management

- Coach less experienced staff on the principles and importance of maintaining confidentiality
- Support others in upholding ethical risk management and professional standards and escalating issues promptly
- Engage with individuals to bring them together as one team and create a workplace environment that supports their wellbeing
- Support others in their personal development, providing information, opportunities for development, teaching, support, coaching, guidance, and feedback

Firm Management

- Ensure the confidentiality and security of the Firm's and client's documentation and information
- Apply good business practice
- Align activities to the Firm's strategy, identify key deliverables, ensure their deliver, and monitor them against the plan

This job description is not a definitive list or exhaustive list of responsibilities but identifies the key responsibilities.

Job Specification

	Essential	Desirable
Qualifications	Admission to the Solicitors Roll or Licensed Conveyancer or CILEX Lawyer	
Knowledge and Experience	0 - 2 year's PQE To have experience of general Wills and Probate work Ability to draft and review legal documents which accurately reflect the client's instructions Ability to develop client relationships and identify areas for expansion of work	
Skills	Ability to work under own initiative, anticipate challenges and deal with them proactively Ability to communicate effectively both verbally and in writing with a diverse range of persons/ organisations Ability to work unsupervised and decisively to provide sound and clear advice on own initiatives Ability to work under pressure and meet tight deadlines Ability to plan and prioritise work effectively to meet own objectives and those of the team Ability to adapt to change	Ability to train, coach and mentor colleagues within the team Ability to develop and express creative proposals for continuous improvement of services A commitment to Lexcel/Quality Management standards

	Flexible approach to teamwork with a willingness to provide cover in colleague's absence and to pick up work outside of own specialism if necessary	
	Ability to learn and master new areas of law and legal practice quickly	
	Ability to evaluate information in complex situations and the confidence to take sound decisions independently	
	Drive, enthusiasm, versatility, and self-motivation	
	IT Skills: » Microsoft Office » Case management » Digital Dictation	

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